Communication Templates

CREATING AND MANAGING EMAILS

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Introduction

This guide will outline all the essential information you need to know about creating Communication Templates within Talentlink and maintaining the templates you already have within your environment.

Throughout the guide, you will see the following icons which indicate the WMJobs Team's recommendations which will help you with all your [title] queries.

Top tips

Important Information

Best Practice

1. Before getting started…

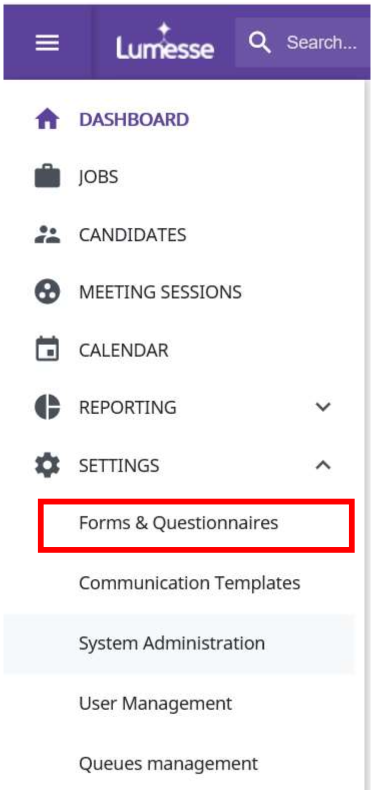
Within Talentlink, you are able to create multiple Communication Templates which can be assigned to the steps within your Job Approval and Selection processes or created to communicate within your candidates through the system – in essence, they are emails sent through the system.

Before templates are created and managed within Talentlink, it's important to note that to do so, the role of **Template Manager** is assigned to your account through **User Management** – the role will need to be allocated by a Local System Administrator.

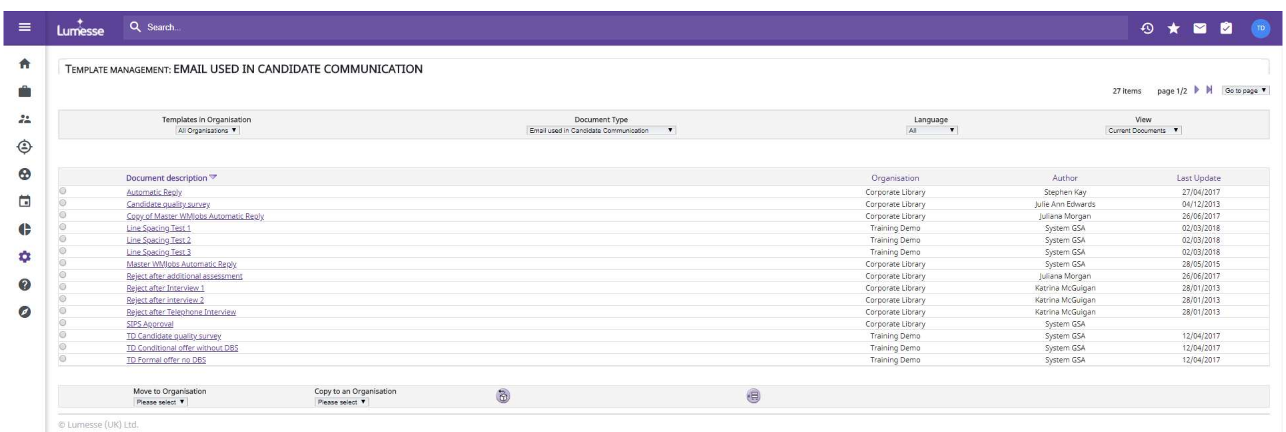
For more information about assigning roles, please visit our **User Management** topic home page on the Service Centre.

2. Creating a new Communication Template

Once you are logged into Talentlink, navigate to the left-hand menu and select ‘**Settings**’, then ‘**Communication Templates**’;

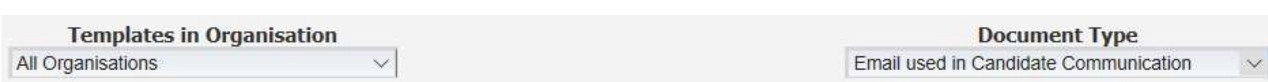


Once selected, you will see the Communication Template Management screen;



Before adding a new template, you will need to **select the Organisation** you want the template to sit under, and what type of communication you are creating by selection the appropriate ‘**Document Type**’.

Along the top of the screen, you’ll see two drop-down menus – ‘**Templates in Organisation**’ and ‘**Document Type**’;



To select the organisation you want the template to sit under, select this from the list ‘**Templates in Organisation**’

You may have more than one organisation sitting in this list, depending on your set-up.

You may also see the organisations **‘Best Practice’** and **‘Corporate Library’.** These organisations contain templates that are used by everyone across the partnership. We ask that **no amendments** are made to these templates and that new templates are created in your own local environments

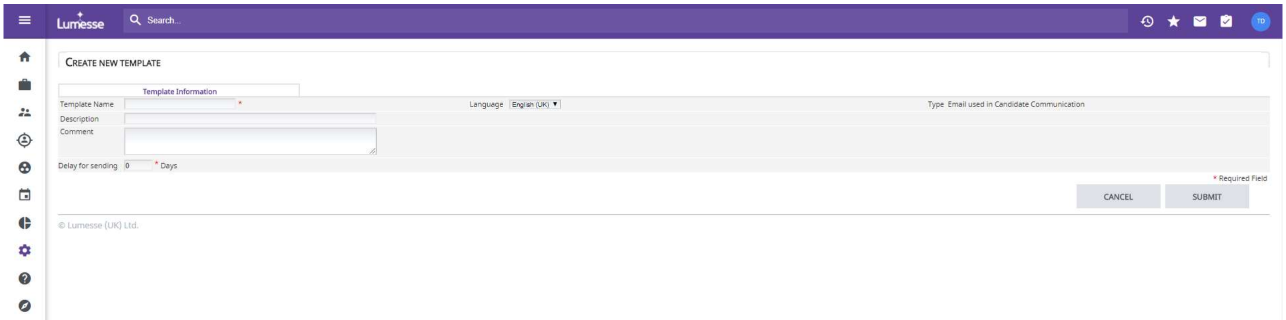
Then select which type of communication you want to create from choosing an option from ‘**Document Type**’. A description of each of the values is shown below;

Document Type	Definition
Email Used in Candidate Communication	This includes all communications sent to a candidate via the ‘Contact by Email’ option, for example, a rejection email and for any selection process steps where a communication is sent to a candidate, for example, conditional offer
Email Used in Referral Program Communication	These communications are used within the Referral Module within Talentlink – **this is not being currently used in our environment**
Email Used in Job Approval Process	These are the communications sent when a position is being approved. You can add Approve/Reject merge fields so a user can make a decision about a role within logging on to Talentlink
Email Used in Selection Process	These are the communications used in your Selection Process when a communication is being sent to a manager or anyone apart from your candidate, for example, a reference request or a request to review a CV
MS Word Letter/MS Word Contract Template	MS Word Letter is not something that is being used whereas, MS Word Contract Template refers to a contract template is they are being used
Shared Document	**Shared Documents** can be attached to email templates used in a communication for candidates, for example, a map or location details
Signature	This enables you to create signature files that you can attach to your emails and letters – these are usually configured on a template basis
Job Advert Print Out	The Job Advert Print Out template enables users to print the job advert as a PDF or Microsoft Word document **– this is not used within our environment**

Once you have selected, at the bottom of the screen, click the  icon to create a new template.

Make sure you have selected an **Organisation** and **Document Type** – you are unable to change this once it has been created. If these are incorrect, you may be unable to find your template when it comes to using it

You will then need to give your template a name and add a description of what the template is used for;



On the top right-hand side of the screen, it will tell you what type of communication you are creating. This is good for checking if the correct **Document Type** has been selected

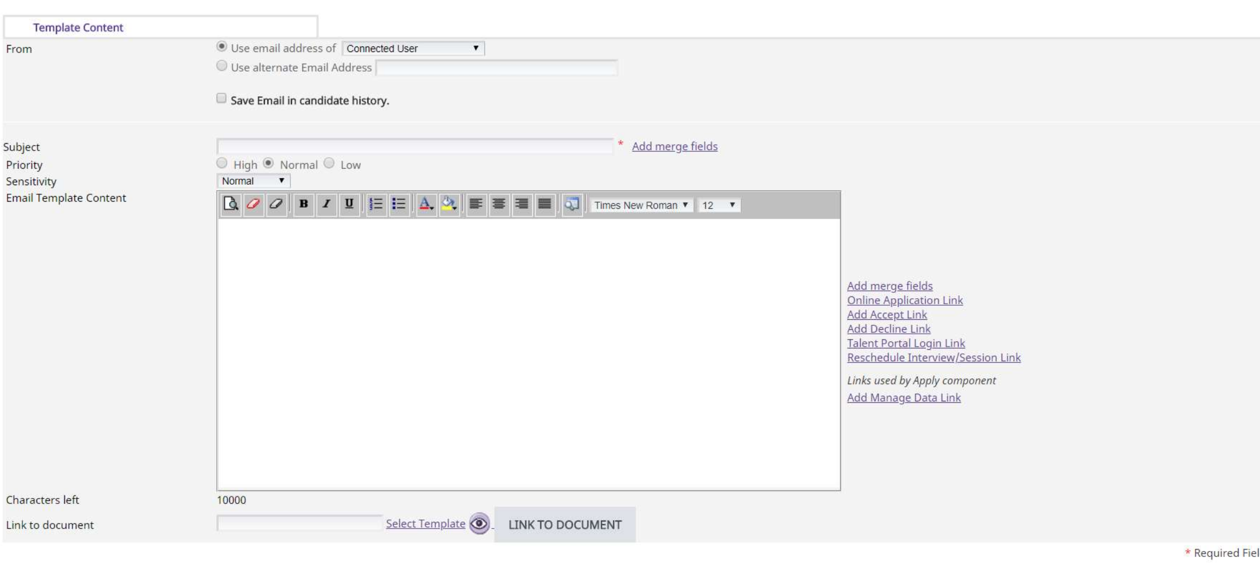
Once you have named the template and added a description, and the bottom of the screen, you can see the option 'Delay for sending';

Here, you can set the amount of days you wish to delay the communication by when it's sent.

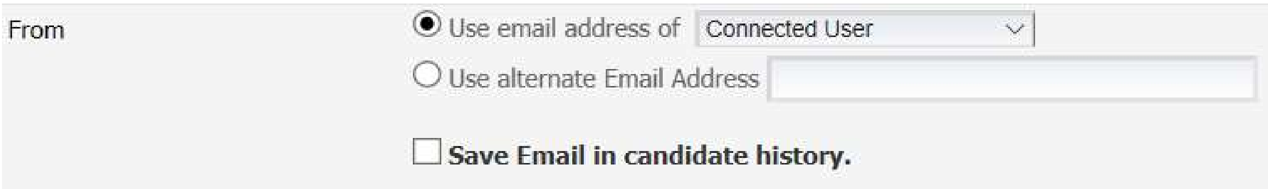
This is only applicable to **Candidate Communications** and works on calendar days rather than working days

When you have completed the fields, click the '**Submit**' button.

Once you click submit, your **Template Content** screen will appear in order for you to start adding the context of your email;



Firstly, you'll see the option '**From**'. This allows you to set on the template if when the email is sent it shows as being sent from the Connected User's email address or you can choose to enter an alternative email address and use a masked email, for example, a general HR mailbox;



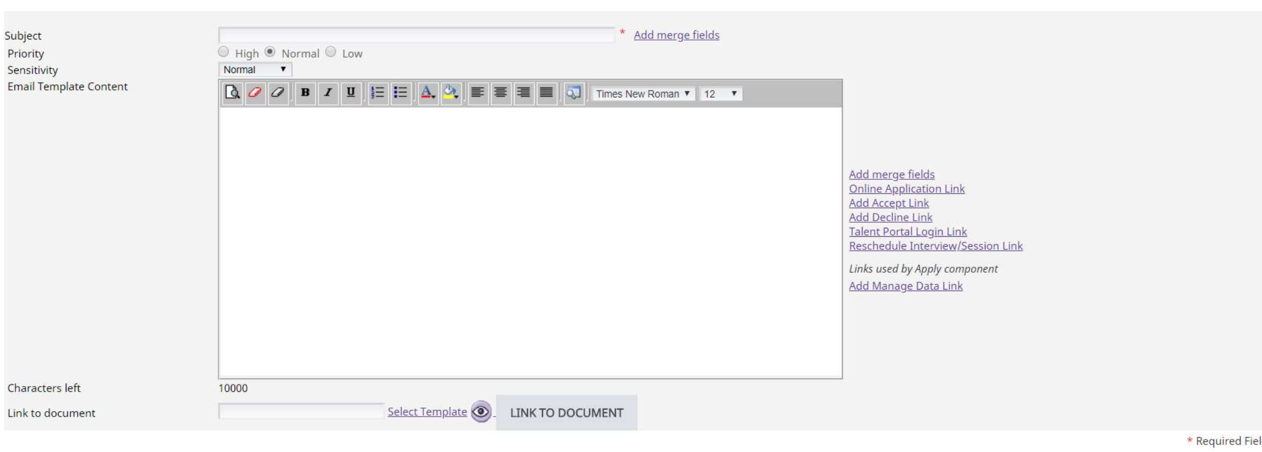
If you select the drop-down menu for 'Use email address of', you can also select a member of the recruiting team's email address, bearing in mind that this can change from vacancy to vacancy.

To use the masked email, select 'Use alternative Email Address' and enter the email address into the box next to the title of the field.

Underneath, there is an option to select if the email will be saved in the candidate's history tab on their profile.

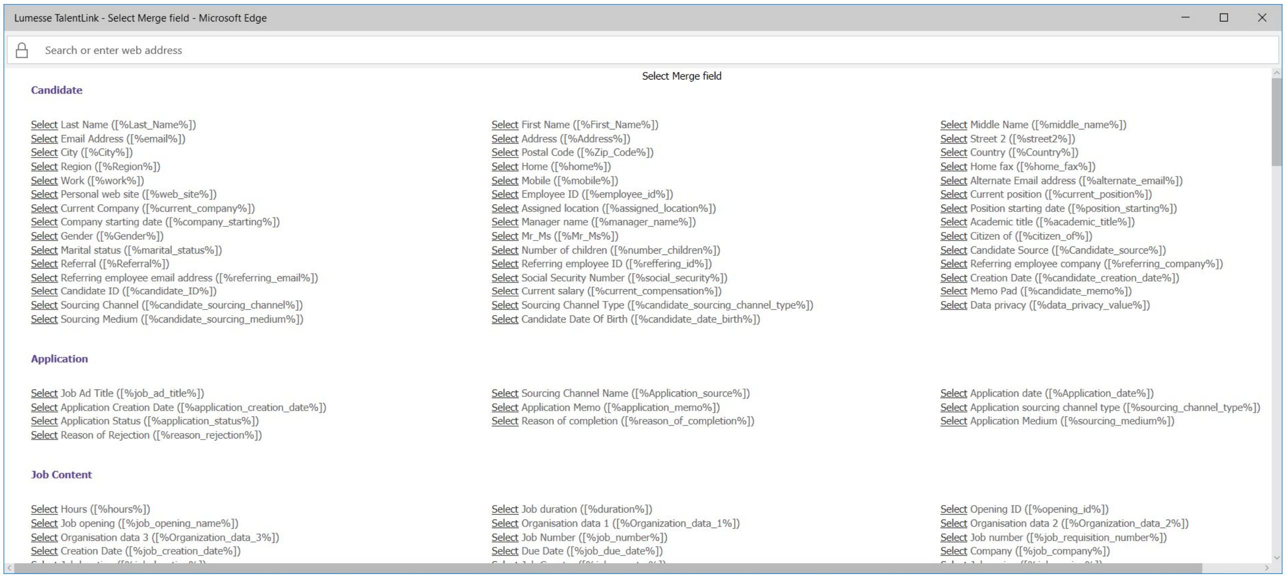
We recommend that the option, '**Save Email in candidate history**' is **always selected**, so you can see exactly what communications have been sent to each candidate through the system

Then, you can start adding the context of your email.



Firstly, enter the subject of your email template. This is a **mandatory** field. You will see next to the subject the option to 'Add merge fields';

If you select this, a pop-up box will appear with a list of available merge fields;



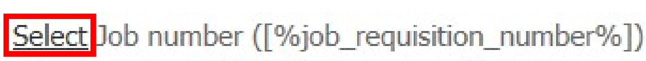
These are all **standard Talentlink fields** – **there are no options to use configurable fields which you have created locally**. The merge fields are broken down into categories of where they sit within the system. The categories are as follows;

Candidate
Application
Job Content
Person in Charge 1
Person in Charge 2
Person in Charge 3
Selection Process
Lead Interviewer
User Data
Current Contract

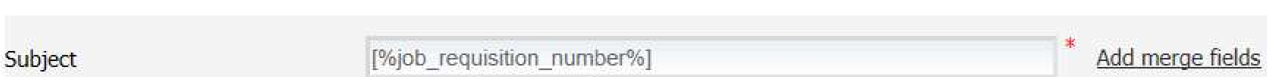
As these fields are standard, you may find that you are using some of the fields the merge data relates to but you may find you aren't.

We recommend that if you are creating a Communication Template and using merge fields that these are **tested locally in Sandbox** to see if you are using the fields and if the data pulls through. It's difficult to understand the set-up of each Organisation and recommend testing takes places before a query is raised

If you wish to use a merge field, next to the field name, click '**Select**';



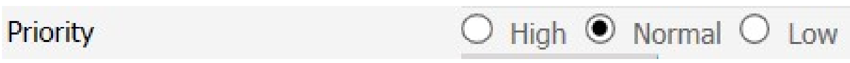
This will then be entered into your Communication Template;



The merge field will pull through data **exactly how it is entered into the field.** For example, ‘Job Title’ will pull through whatever a user has inputted into the field, so locally, if you are using coding within this field, bear in mind this will pull through in your merge field

Underneath ‘Subject’, you can select the **priority** of your email and the **sensitivity**, similar to other email providers, such as Outlook.

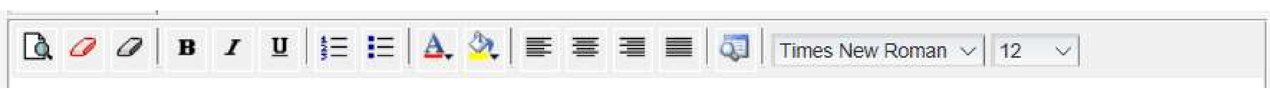
Select what priority you wish your email to be by checking the relevant option;



Then from the drop-down list, select the sensitivity of your message;

You can now add the **Email Template Content** of your message.

When entering information into the content of your message, you will see a toolbar which allows you to format the message;

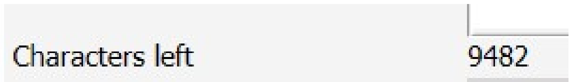


If you copy and paste text from a **Word Document**, this can pull through hidden HTML formatting which can make the text difficult to format once entered or ‘knock out’ the formatting. If you are copying and pasting information from another source, we **strongly suggest** you paste any text into **Notepad** first to remove formatting and then paste this into Talentlink so the message can be formatting using the tool within Talentlink

On the right hand side, you can see the ‘Add merge fields’ options again if you want to add merge fields into the content of your email, along with a few more;

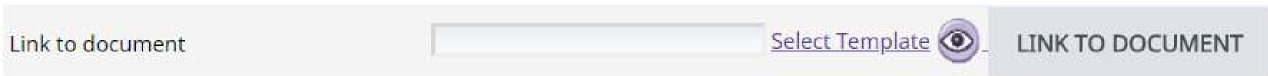
The other options listed here are not something we are using collectively as a partnership, therefore aren’t being used.

When entering your email content, you can see a word count at the bottom on the content box;



This will alert you if you have used too many and will highlight in red.

Under the word count, you will see the option '**Link to document**';

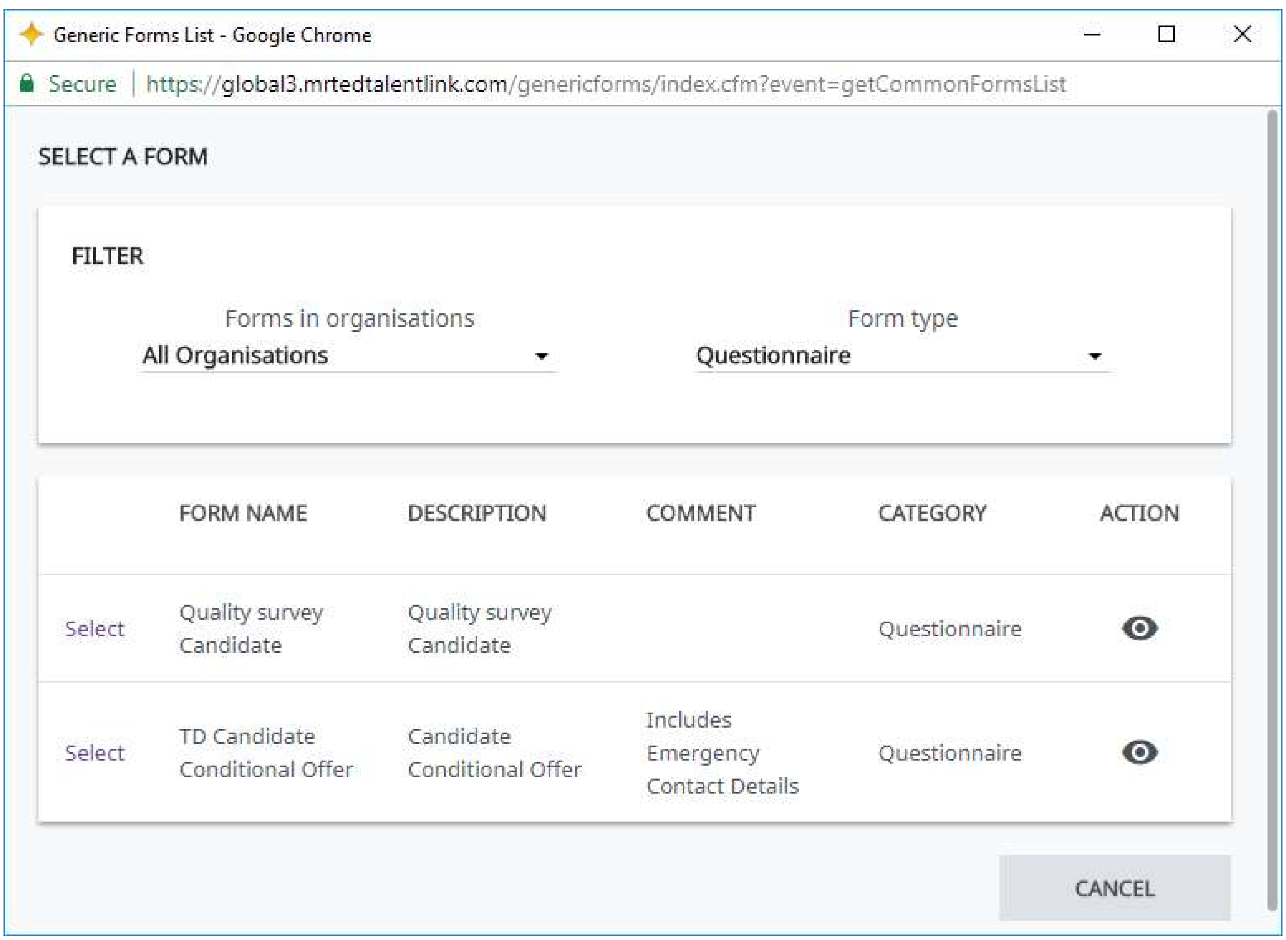


Here, you are able to link a template to the communication template and by selecting the 'Link to document' button, you can enter into the content of your email a hyperlink to the document which you can amend.

You are only able to amend the hyperlinks within an email for form types 'Questionnaire', 'Profile', 'Diversity Questionnaire' and 'CV'.

This will not work for 'Feedback Reports' as these are attached to **Selection Process** emails rather than **Candidate Communications**

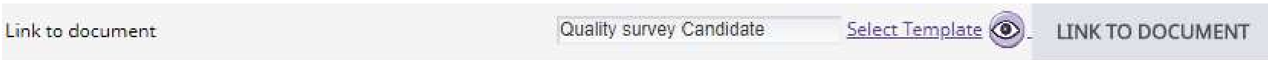
To attach a template, click '**Select Template**'. A pop-up box will appear to select which template you want to attach;



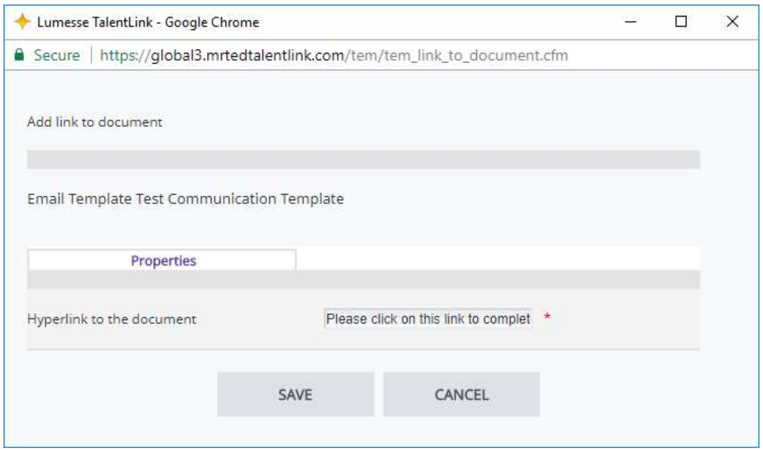
Along the top, you can filter the Organisation and Form Type.

You are able to preview the form by clicking the icon under ‘Action’;

To select a template, click ‘**Select**’ to the left of the Form Name. Once selecting, you will see the name of the form appear in your Communication Template;



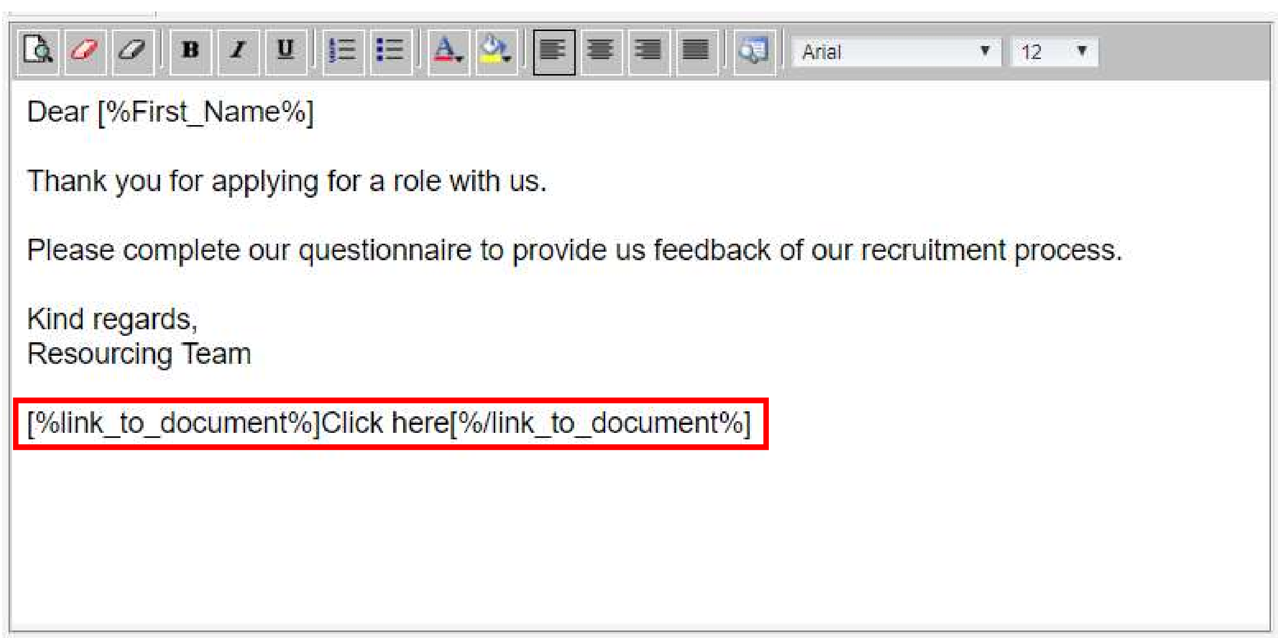
To include a link to the document within your email, click the ‘**Link to document**’ button. A pop-up box will then appear as follows;



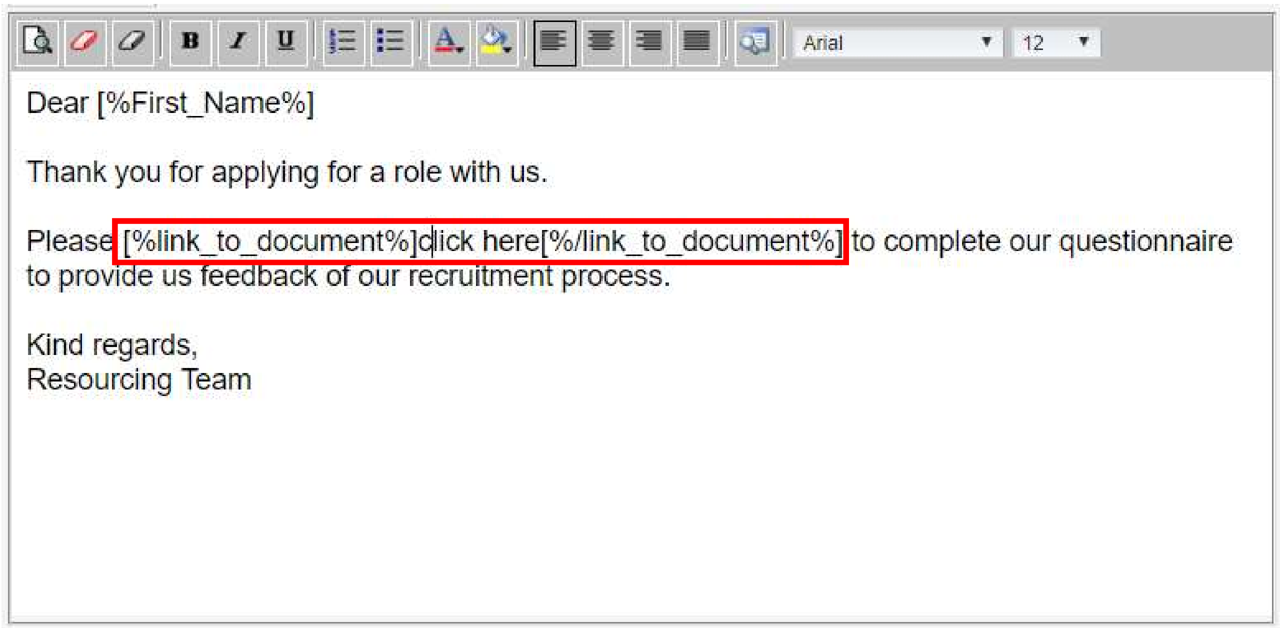
Within the field, ‘Hyperlink to the document’, you can see the standard text which is included at the bottom of the email if this isn’t populated. Enter here the text you want to appear in the email as a hyperlink for the receiver of the email to click.

Once you have entered the text, click the ‘**Save**’ button.

You will then see in the content of your email, the text, surrounded by coding that you entered for the hyperlink;



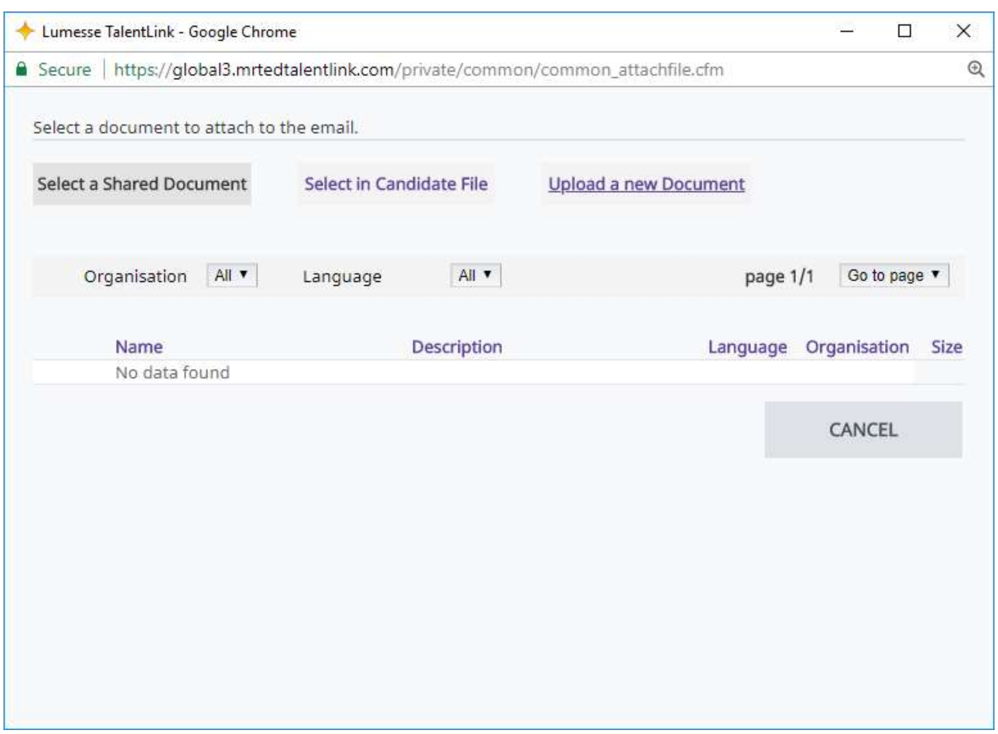
You are able to move the text to wherever you wish to it to appear. If you want to update the text, select the ‘Link to document’ button and update as you wish;



You are able to add attachments to a template under ‘**Email Attachments**’;

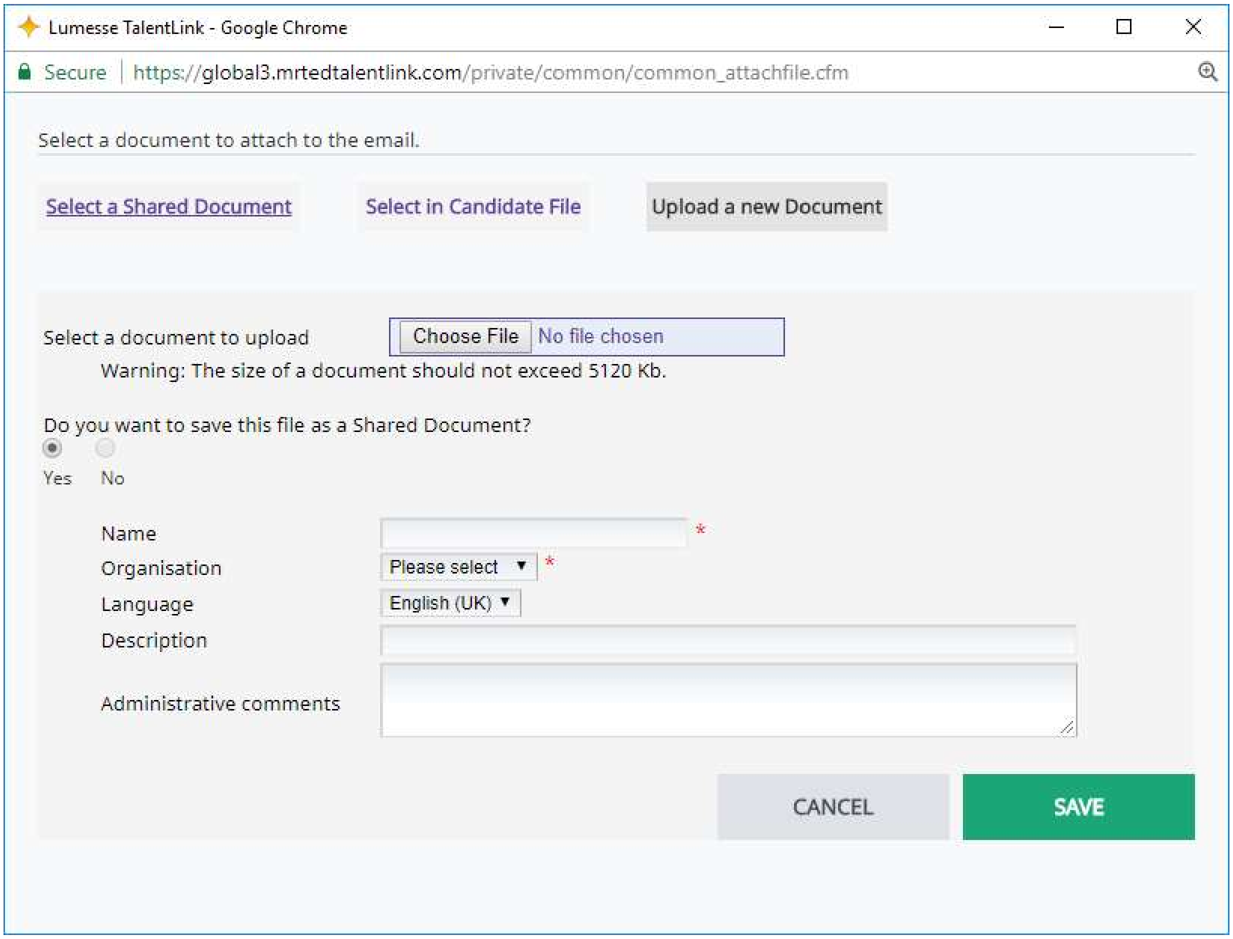
Click on the ‘**Add a new document**’ to add an attachment.

A pop-up will then appear when you can either attach a ‘**Shared Document**’ which already exists in the system or ‘**Upload a new Document**’ to create a new Shared Document;



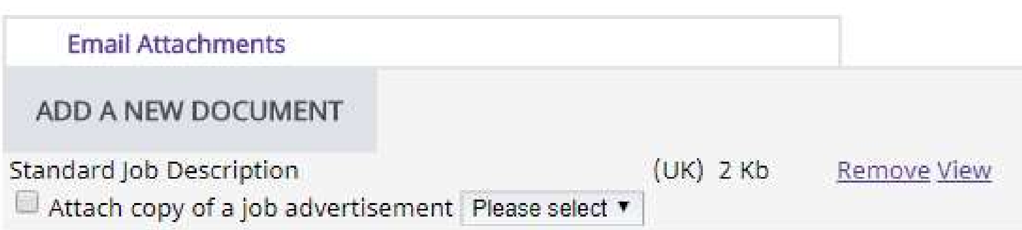
A ‘**Shared Document**’ refers to one you have manually uploaded to the system and creates a bank you can manage under your Communication Templates Management screen – when sending a communication template, you can select ‘Add a document’ at point of sending and this will bring forward your ‘Shared Document’ or you can choose a ‘Shared Document’ when creating a template

If you ‘**Upload a new Document**’, you will be asked to browse your machine for a document with the limit size outlined and asked to enter details of the document for your ‘Shared Documents’ area;



Once you have uploaded your document, entered the document details, click the green ‘**Save**’ button.

You will then see the document you’ve uploaded included on your communication template;



You can add more than one document to a communication template – by mindful of the size of the documents and what limit they all add up to – if there are a large number, you may find the email isn't received due to size limitations for the receiver

Once you have added all the elements of your communication, at the bottom right, click the icon.

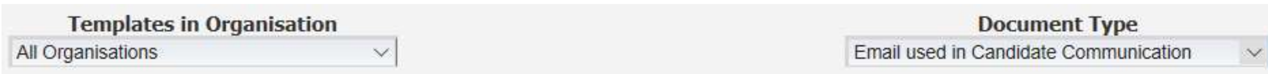
This will take you back to your Communication Template Management screen and you will see your communication template sitting in the list under your chosen Document Type.

3. Editing a Communication Template

Once you have created a Communication Template, you can go back and edit it, or you can make changes to the templates that already exist within your environment.

To makes changes to a template, navigate back to your Communication Template Management screen by selecting '**Communication Templates**', from the left-hand menu under '**System Administration**'.

Filter the list to the **Organisation** and **Document Type** your template sits under and this will bring forward the list of templates which sit in your environment for this Document Type;



To edit the template, click on the name of the template within the list;

This will bring up the contents of the template where you can change the content, attachments or any details you wish.

Once you have made the changes, click the icon.

If you make a change to a Communication Template which sits in your organisation's selection process, **the change will appear straight away** – be mindful if you have live vacancies

4. Managing Communication Templates

Within Communication Template Management you are able to manage your templates for your organisation and all the organisations you have access to (if you have access to more than one).

You can **move** your templates between organisations, **copy** a template to another organisation and **archive** your templates if they are no longer in use.

Moving a template

If you wish to move one of your templates to another organisation, firstly, access ‘Communication Templates’ from the left-hand menu under ‘System Administration’.

Filter your templates to which ‘**Organisation**’ the original template sits in and what ‘**Document Type**’ the template is (**see page 4**).

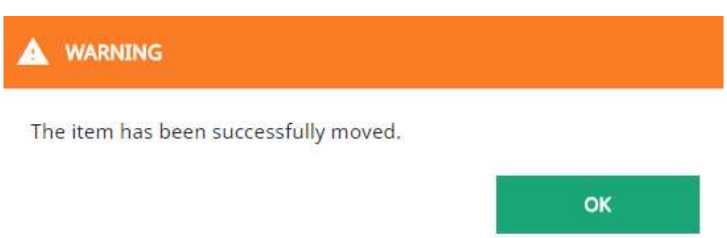
From your list, select which template you wish to move;

At the bottom of the list, you will see several options;

To move the template to another organisation, under ‘**Move to Organisation**’, click on the drop-down arrow to access your organisations, and then select the organisation you wish to move the template to.

By selecting the organisation from the drop-down list, **this is the system’s prompt to move the template** – you are not asked to confirm whether you want to move the template, this will automatically be done by choosing an option from the list – be mindful before moving your templates

Once you have selected an organisation, the system will update, and you will receive a confirmation to say your template has been moved;



This template will now sit under the new organisation you chose.

Copying a template

If you wish to copy one of your templates to another organisation, firstly, access ‘Communication Templates’ from the left-hand menu under ‘System Administration’.

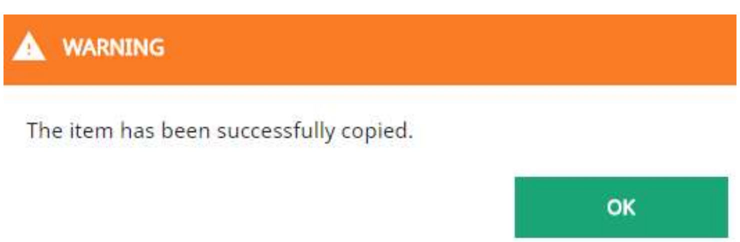
Filter your templates to which ‘**Organisation**’ the original template sits in and what ‘**Document Type**’ the template is (**see page 4**).

From your list, select which template you wish to copy;

At the bottom of the screen, under ‘**Copy to an Organisation**’ click on the drop-down arrow to access your organisations, and then select the organisation you wish to copy the template to.

This works in the same way as moving a template - by selecting the organisation from the drop-down list, **this is the system’s prompt to copy the template** – you are not asked to confirm whether you want to copy the template, this will automatically be done by choosing an option from the list – be mindful before copying your templates

Once you have selected an organisation, the system will update, and you will receive a confirmation to say your template has been copied;



Archiving a template

You are able to manage the communication templates you no longer use by **archiving** them under Communication Template Management.

To archive a form, firstly, access ‘Communication Templates’ from the left-hand menu ‘System Administration’.

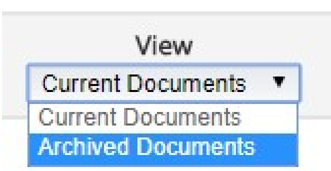
Filter your templates to which ‘Organisation’ the original template sits in and what ‘Document Type’ the template is (**see page 4**).

From your list, select which template you wish to archive;

Once selected, at the bottom of the screen, click the  icon to archive the form.

By clicking this button, **this is the system’s prompt to archive the template** – you are not asked to confirm whether you want to archive the template and you do not receive a confirmation as this will automatically fall into your ‘**Archived Documents**’

To view your archived templates, along the top of the screen within Communication Template Management, at the right-hand side you will see a drop-down under the word ‘**View**’. If you click the drop-down arrow you will see an option for ‘**Archived Documents**’;

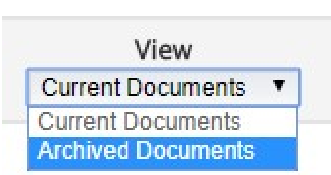


If you select this option, you will see the forms sitting in your archive.

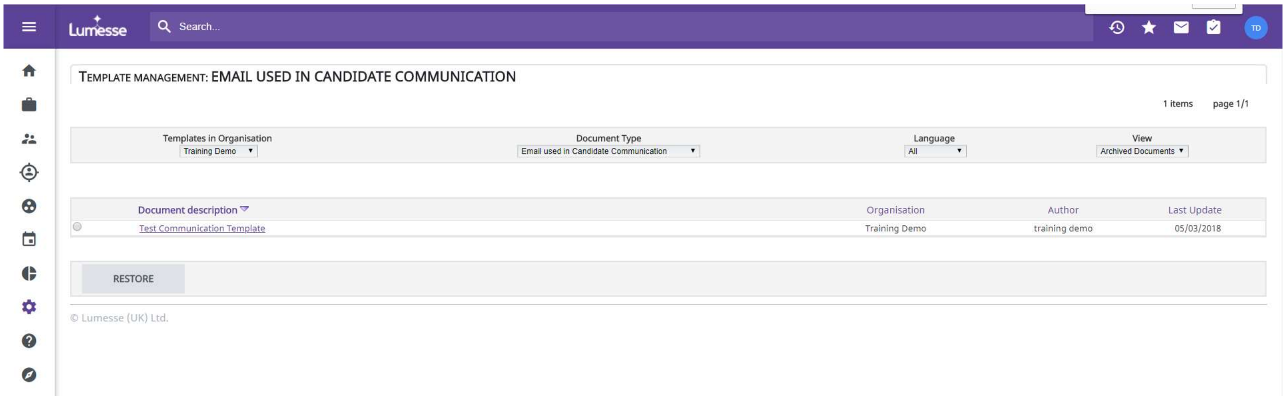
Restoring a template

If you accidentally archive a communication template or wish to use an old template, you have an option of **restoring the form**.

Navigate to your Communication Template Management screen and along the top bar, under ‘**View**’ select ‘**Archived Documents**’;



This will update your screen with all the forms sitting in your archive;

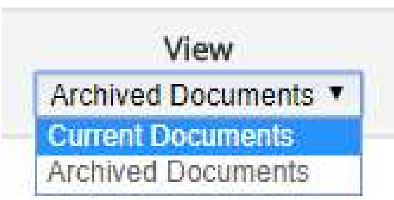


To restore the template, mark the template by selecting the button to the left of the name;

At the bottom of the screen, click the '**Restore**' button.

The system will update and automatically move your form back to 'Current Documents'.

To view your current documents again, at the top-right hand corner, under '**View**', select '**Current Documents**';



5. Adding images to Communication Templates

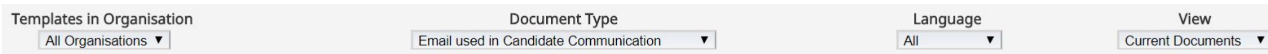
It is possible to add images within a Communication Template – it is slightly different than adding an image onto a Form or using an image using Image Library.

To place a logo or images within a template, this is done specifically using HTML code. We have created a guide dedicated to this – '**Adding Images to Communication Templates**' which is available on the Service Centre.

5. Troubleshooting/FAQ's

I can't find the communication template I've created

This could be for several reasons - if you are trying to search for a Communication Template within your Communication Template Management screen, it could be that you have selected the incorrect **'Organisation**', '**Document Type**' or '**View**';



Make sure you are selecting the correct filters when searching for your template.

You may also be unable to find the template as it was created under the wrong Organisation or Document Type – you would need to manually search for the template as there is unfortunately, no search functionality within the system.

Commonly, Communication Templates are created within an Organisation being specified – it may be worth you searching under 'All Organisations' – if you haven't specified an Organisation, it will sit here;

The formatting within my communication template isn't appearing correctly

The formatting of text within a Communication Template can sometimes be a tricky one – the first thing we suggest is that if you are copying and pasting text from a document into TalentLink, to strip the formatting of the text by **copying** this into a program such as Wordpad or Notepad, which will take out the formatting, and then format this text using the formatting options available within TalentLink.

What you need to bear in mind is that, the box where you are entering your text for your email template is a piece of formatting software which sits within TalentLink which allows you to format text and also allows you to enter HTML code.

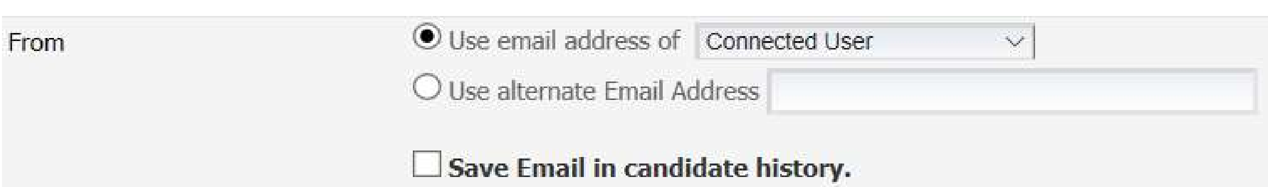
If you are copying and pasting text from, for example, a website, the text can sometimes contain hidden HTML coding which sits behind the text. The HTML coding from the source, may not be compatible with the HTML format of the formatting tool within TalentLink, which is why sometimes you may see discrepancies – for example, fonts being different sizes, line spaces being different etc.

Ideally, if you are creating templates, you should type the content directly into the template and format the text using the formatter available. However, we do understand that sometimes this can be unpractical, which is why we suggest using Wordpad or Notepad.

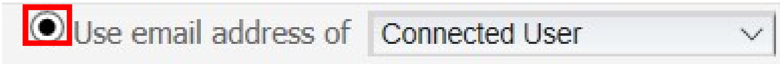
If you are finding problems with formatting, enter the information directly into the textbook and format this afterwards and test your emails – you will then see how this will appear to an end user.

An email I've created is being sent from the incorrect sender

This is in relation to what you have set within the Template Content under '**From**'**;**



If you have selected ‘**Use email address of**’, you can choose to send from the connected user or a member of the recruiting team. The connected user refers to who is sending the email from the system, with recruiting team referring to who you’ve specified under ‘Team Members’ on the job requisition for the vacancy – ensure this is checked if one of these options applies;



If you have ‘**Use alternate Email Address’** selected, this will mask the email address with what you enter here. Ensure this is entered correctly.

If you are seeing the domain ‘@westmidlands.as.recruitmail.com’ when sending an email, this is normal system behaviour as it is expected. Please see our **Technical Requirements** page on the Service Centre for more information.

An email I’ve sent is not showing in file for the candidate

In order for an email to be registered within the audit history for a candidate, you will need to ensure that within the Template Content, under ‘From’ that ‘**Save Email in candidate history**’ has been selected;

If this isn’t selected for your templates, TalentLink will not retain an audit history of this email.

A communication template I’ve created is the wrong ‘Document Type’ – what do I do?

Unfortunately, there is no way to change the Document Type of a Communication Template once it’s been created.

In this circumstance, you would need to create the template again, ensuring you select the correct **Document Type** at the stage of creation. The incorrect template can be archived – see **pages 17-18** for more information about archiving templates.

You can now create and manage Communication Templates!

We have outlined in this guide the essential information you need to know about creating emails within TalentLink and also, how to manage your existing templates and new ones that you create.

For more information around Configuration, please visit our **Topic Homepages** on our Service Centre at http://wmemployers.freshdesk.com/helpdesk

Communication Templates is a module featured in our **Open House Configuration Training**. If you or any colleagues are interested in attending an open house training session, please contact the team who will be able to provide you with further information.